PDspect
INSPECTION SOFTWARE

How To

Move a Template to the App from a PC

This How To article explains how to move a template from your PC to the App using the cloud drive.

For a complete list of available How To documents visit the
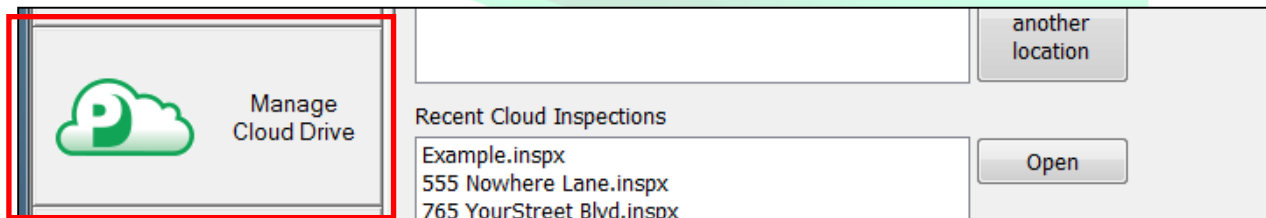Support section of our website: http://www.pdspect.com/support/index.php

This document will walk you through how to upload a template to your cloud drive so you can use it on the app.
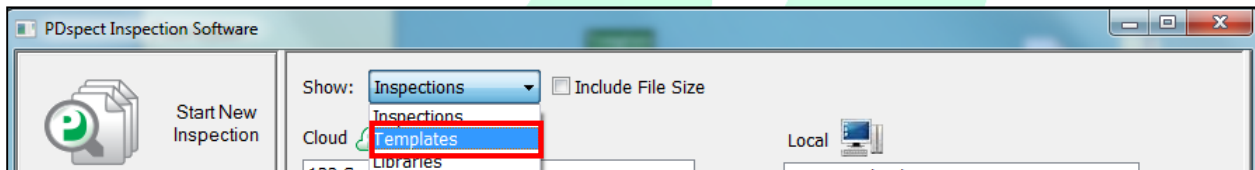
1. The first step is to open the Palm-Tech program by double clicking on the icon on your desktop.
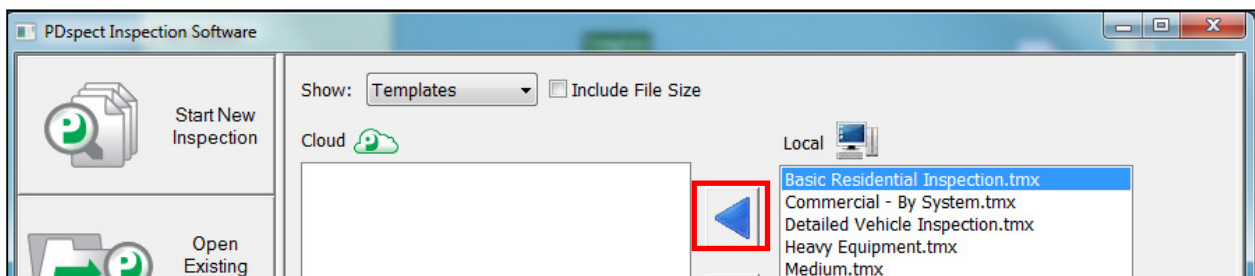

2. Once the main program appears, click on the 'Manage Cloud Drive' tab on the left hand side.

3. Next, click on the dropdown next to 'Show' at the top and select 'Templates'.

4. You will now see a listing of all of the templates on your Local PC and on your cloud drive. The template we will be moving for this example is named 'Basic Residential Inspection.tmx'. To do this we'll click on 'Basic Residential Inspection.tmx' under local and then click on the top arrow (down the middle of the box) to send it to the cloud drive.
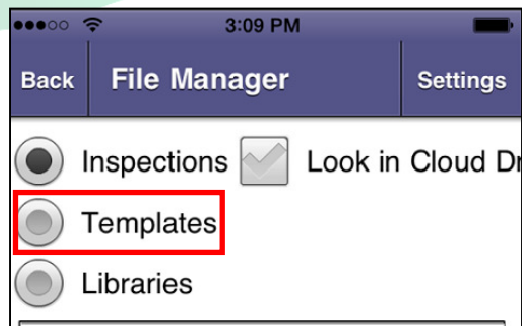
5. A message will appear letting you know the transmission is in progress. This process can take anywhere from a few seconds to a minute depending on the size of the file. Do not click on anything while the 'Transmission in Progress' box is up. Once it is complete, the box will disappear.

6. The template has now been uploaded to your cloud drive. The next step is to open the Palm-Tech App on the device you are moving the template to.

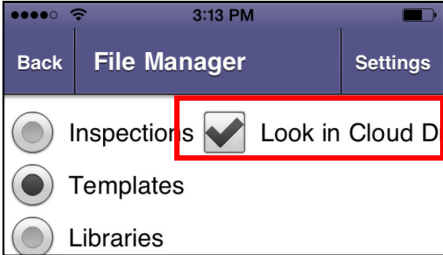7. From the main screen of the app, tap on the 'File Manager' button at the top.

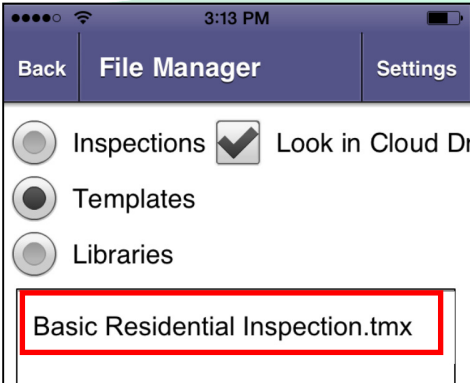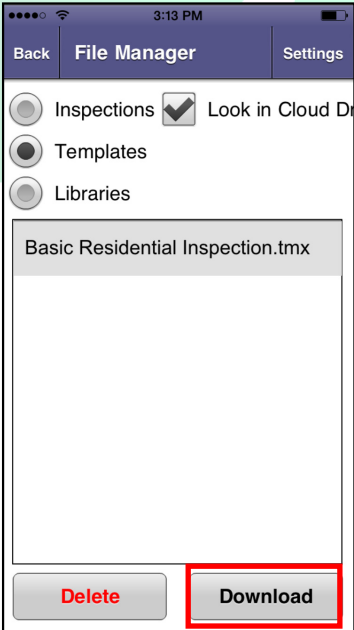8. Next, tap on the 'Templates' button.

9. Then, tap on the 'Look in Cloud Drive' button'.

10. Now, tap on the template file you want to download. This will be 'Basic Residential Inspection.tmx' in this instance.

11. Finally, tap on the 'Download' button in the lower right hand corner.

12. A message will appear that says 'downloading' and after a few seconds will disappear. Once the message no longer appears, the template will be downloaded and you will have successfully moved your template from the PC to the app. The next time you go to start a new inspection on the app you'll see your new template as an option.

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